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Insights on Canadian Society

# Consumption of culture by older Canadians on the Internet

*by Mary K. Allen*

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- |                |  |
|----------------|--|
| ..             | not available for any reference period   |
| ...            | not available for a specific reference period  |
| ...            | not applicable   |
| 0              | true zero or a value rounded to zero   |
| 0 <sup>s</sup> | value rounded to 0 (zero) where there is a meaningful distinction between true zero and the value that was rounded |
| <sup>p</sup>   | preliminary  |
| <sup>r</sup>   | revised  |
| x              | suppressed to meet the confidentiality requirements of the <i>Statistics Act</i>                                   |
| E              | use with caution   |
| F              | too unreliable to be published   |
| *              | significantly different from reference category ( $p < 0.05$ )   |

# Consumption of culture by older Canadians on the Internet

by Mary K. Allen

## Overview of the study

In recent years, older Canadians have increased their Internet usage and are closing the gap with younger Canadians. However, older Canadians do not use the Internet as much for their consumption of some cultural items, namely music listening and video viewing. This study examines the extent to which seniors 65 and over are using the Internet as a source of cultural content, particularly music.

- Older Canadians increased their Internet usage markedly over the 2000s, but remained less likely to use the Internet than younger age groups. In 2010, 29% of people age 75 and over and 60% of those 65 to 74 had used the Internet in the previous month, while Internet use among those age 15 to 24 was almost universal.
- In 2010, 87% of 15- to 24-year-olds listened to downloaded music at least once a week. In comparison, older Canadians age 65 to 74 were less likely to go online for music—10% listened to music downloaded from the Internet on a weekly basis.
- Older Canadians still rely on traditional formats when they listen to music. In 2010, over 80% of senior listeners 65 or over had not made the leap to downloaded music, thus relying on other formats like CDs to listen to music. This compared to just 6% among those age 15 to 24.
- The digital gap between generations was also large in the area of movie and video viewing. In 2010, about 10% of Canadians 65 and over watched movies or videos on the Internet compared to almost 80% among those age 18 to 24.

## Introduction

In less than 20 years, the Internet has altered our lives in many ways—it has changed the way Canadians read books and magazines, watch movies and videos, and listen to music. Throughout this Internet revolution, youth have been on the technological edge as they adapted rapidly to the Internet as a source of cultural content. While older Canadians have been going online at a rapid pace, there remains a notable digital generation gap in the consumption of culture on the Internet, whether to watch films online or listen to downloaded music.

In the early days of the digital revolution, there was talk of the 'digital divide' between those who used the new technologies and those who were slower to take

it up, particularly older Canadians. There was concern that they would be left behind, on the 'shoulder' of the information highway.<sup>1</sup> This is an ongoing concern, particularly in culture.

Internet growth has coincided with changes in the availability of cultural content by traditional means: a number of music and book stores have closed, some magazines and newspapers have reduced or considered cancelling print editions, and some writers and creators have sidestepped print publishers and record companies to reach audiences directly online, using websites, blogs and online videos. As traditional outlets disappear and creators move their work into cyberspace, will older Canadians be left out of the audience?

Access to and the development of cultural content has long been an issue for Canadians. Public programs support and promote Canadian artists and work to ensure that their products are readily available to all Canadian consumers. For example, there are cultural policies to regulate radio and television broadcasting to ensure that Canadian content reaches Canadians everywhere. Because of its potential impact on more traditional areas of culture, the increasing use of the Internet as a primary source of culture content could create a number of challenges for these policies.

In this context, this article examines whether older Canadians have modified how they consume some cultural products, particularly music. Music was one of the first cultural industries to feel the impact of the digital revolution, and younger individuals quickly shifted to the Internet for music. Music therefore provides an opportunity to see whether the Internet has changed consumption patterns for different age groups over an extended period. This article also looks at available information on age differences in the consumption of movies, videos and books, for which the impact of the Internet is more recent.

A variety of data sources are used in this study. One important source of culture consumption and Internet usage information is the General Social Survey (GSS), which began asking questions about technology use in the early 2000s and has collected information on culture consumption periodically since 1992. Another source is the Canadian Internet Use Survey (CIUS), which provides information not only about Internet usage but also about specific Internet uses, including entertainment (see *Data*

*sources, methods and definitions* and *Survey questions on Internet use and culture consumption*).

### Generational divide in Internet use

In its early years, the Internet quickly attracted the younger generation. In 2000, 85% of 15- to 24-year-olds reported they had used the Internet in the previous year and about 50% said they had been online in the previous month. In comparison, less than 10% of seniors reported having been online in the previous month. When expressed in terms of 'relative rate of activity,' youth were 1.5 times more likely to have been online in the previous month than the average Canadian in 2000, while older Canadians were using the Internet at a much lower rate than the average Canadian (0.27 times) (Chart 1).<sup>2</sup>

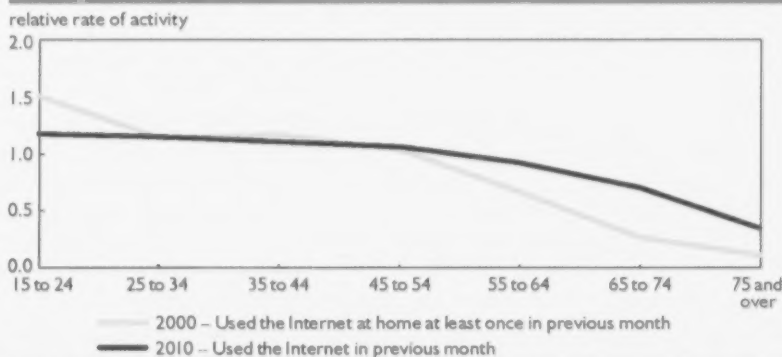
Over the 10-year period from 2000 to 2010, youth became less of a vanguard as older age groups were catching on. Internet use in the previous month by older age groups significantly increased over this period. However, there still

was a notable generation gap.<sup>3</sup> The lowest relative rate of activity was among those age 75 and over. This group may be less interested in going online, have difficulty finding what they want, or may face age-related limitations, which would restrict their ability to use computers and the Internet. Even those who have previously been active online may face increasing difficulties related to visual challenges, manual dexterity problems, and memory or cognitive issues.

### The digital revolution in music

The sound-recording industry had already started the move to digital media (CDs) in the 1980s, so the growth of the Internet quickly presented the industry with new opportunities as well as new challenges. File sharing and the development of both free and paid downloading services meant that record labels no longer had the same control over the distribution of music. Revenues for the sound recording industry fell considerably over this time.<sup>4,5</sup>

**Chart 1 Older Canadians increased their use of the Internet but still had lower rates of activity than the average Canadian in 2010**



Note: See *Data sources, methods and definitions* for actual question wording.  
Source: Statistics Canada, General Social Survey, 2000 and 2010.

Although music sales fell, Canadians continued to listen to music as frequently as before, at least judging by the percentage of Canadians who were listening to music at least once a week through the 2000s. In 1998, 75% of Canadians said that they were "listening to cassettes, CDs, or records at least once a week." In 2010, the proportion of Canadians who "listened to music at least once a week" (all formats) was 73%. Moreover, although younger Canadians have always been more likely to spend time listening to music (at least 95% of them did so), the percentages changed little over time for Canadians of all ages.<sup>6</sup>

What did change, however, was the source of the music. Overall, listening started shifting from traditional formats like CDs and cassettes to downloaded music files like MP3 files. In 2005, 98% of Canadian music listeners used traditional formats like records and CDs to listen to music, and 33% had listened to downloaded music in the previous year (Chart 2). By 2010, record and CD listening had dropped to 87% of music listeners, while 59% were listening to downloaded music, some exclusively (13%). Music listening behaviour was shifting as listening to downloaded music became more popular.

## Generational divide in music listening

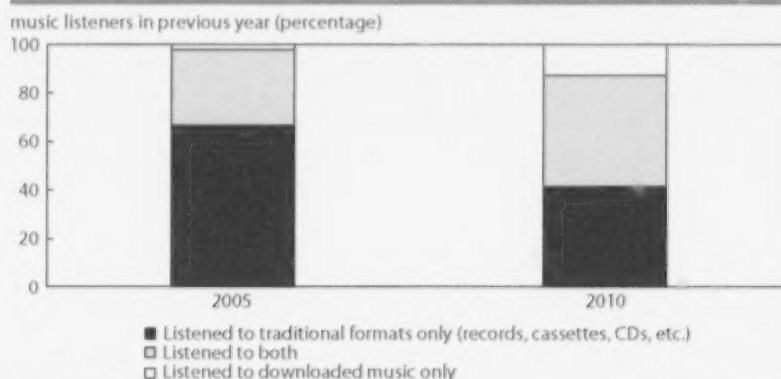
Music listening on the Internet appears to be highly skewed towards younger generations of Canadians—they both listen to music more frequently and are more likely to use technology, leading to significant differences in terms of relative activity rates for different age groups who listen to downloaded music at least once a week. In 2010, 87% of 15- to 24-year-olds listened to

downloaded music at least once a week, and were at least twice as likely as the average Canadian to do so (Chart 3).

In comparison, older Canadians age 65 to 74 were less likely to go online for music: in 2010, 10% had listened to music downloaded from the Internet in the previous week, for a relative rate of activity

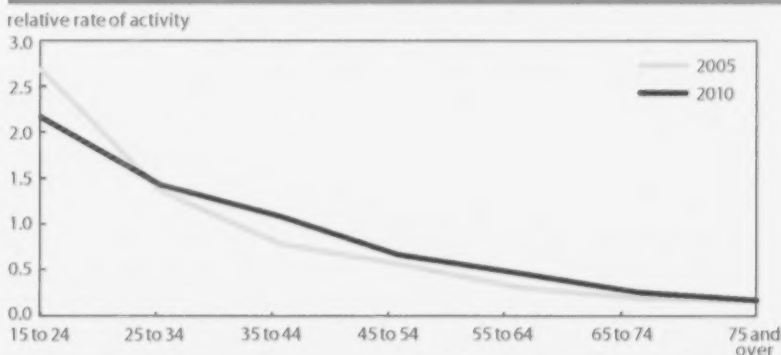
that was 0.25 times that of the average Canadian. Even when only Internet users are considered, the gap remains substantial. Among those who had used the Internet in the previous month, almost 9 in 10 young people age 15 to 24 listened to downloaded music, while about 1 in 7 Internet users age 65 to 74 (14%) did so.<sup>7</sup>

**Chart 2 Distribution of music listeners by format, 2005 and 2010**



Note: See Data sources, methods and definitions for actual question wording.  
Source: Statistics Canada, General Social Survey, 2005 and 2010.

**Chart 3 Younger Canadians were at least twice as likely as the average Canadian to listen to downloaded music once a week or more in 2005 and 2010**



Note: See Data sources, methods and definitions for actual question wording.  
Source: Statistics Canada, General Social Survey, 2005 and 2010.



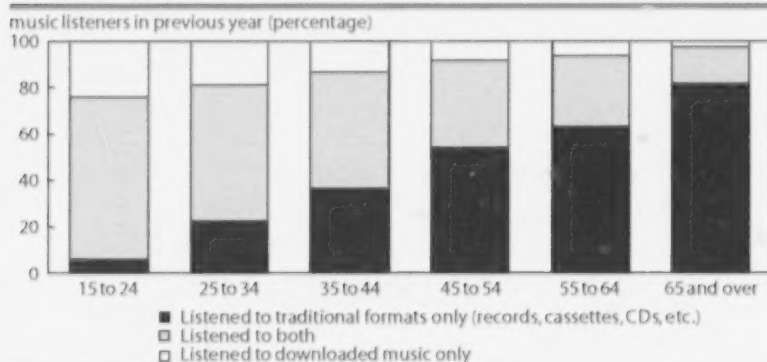
## Consumption of culture by older Canadians on the Internet

Older Canadians still relied on traditional formats when they listened to music. In 2010, over 50% of music listeners 45 or over and more than 80% of older Canadians 65 or over listened to music only in traditional formats like records and CDs (Chart 4).<sup>8</sup> In comparison, 6% of youth age 15 to 24 listened only to records and CDs in 2010.

However, these numbers must be interpreted in the context of a rapidly changing environment. By 2010, 'streaming'—which allows Internet users to listen to music or watch videos without having to download and save a copy of the file to their computer or other device—had become a major source of music consumption.<sup>9</sup> Since 2010, options

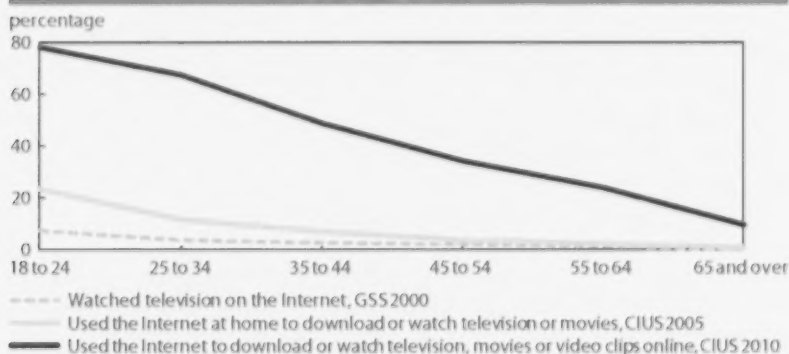
for music listening have continued to proliferate with the increase in music-related mobile phone applications and the introduction of music streaming services. It will be interesting to see what happens to music consumption as the baby boomers (born between 1946 and 1965) evolve into the next generation of seniors.

**Chart 4 Distribution of music listeners by format and age group, 2010**



Note: See Data sources, methods and definitions for actual question wording.  
 Source: Statistics Canada, General Social Survey, 2010.

**Chart 5 Percentage of Canadians who watched television or movies on the Internet, 2000 to 2010**



Note: See Data sources, methods and definitions for actual question wording. In particular, the additional reference to video clips in the 2010 CIUS may have increased the number of responses.  
 Sources: Statistics Canada, General Social Survey (GSS), 2000; Canadian Internet Use Survey (CIUS), 2005 and 2010.

## Generational divide in film and video watching

The Internet has been altering our music-listening habits for well over a decade and the impact has been substantial for the youth market, albeit less so for older Canadians. In other areas of culture, the major impact of the Internet has been more recent and is ongoing, particularly with the introduction of tablet computers and mobile applications, and the expansion of television viewing options. With improvements to bandwidth capacity, online video on-demand services, and mobile applications provided by broadcasters, cable companies and various other online sources, the technology to watch movies and videos online has recently become more widely available.<sup>10</sup> What can the data tell us about this phenomenon?

In 2000, only 3% of Canadians watched TV on the Internet, and, by 2005, 8% of Canadians reported using the Internet in the previous year to download or watch television or movies online. By 2010, this increased to 43%. This activity, however, was driven strongly by youth—in 2010, nearly 80% of youth age 18 to 24 reported that they had used the Internet to download movies or videos (including video clips), while only around 10% of seniors 65 and over did so (Chart 5).

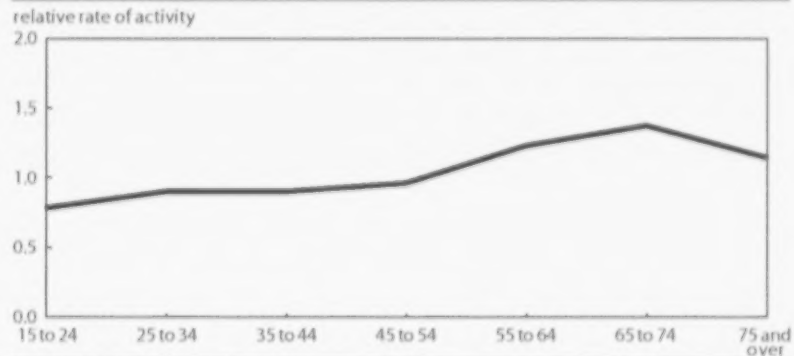
Unlike youth, who listen to more music, older Canadians are more likely to watch television and they tend to spend more hours watching TV. In 2010, Canadians age 55 to 64 watched an average of 2.5 hours of TV on any given day. In contrast, 15- to 24-year-olds watched less than 1.5 hours on average.<sup>11</sup>

### Generational divide in book consumption

Since e-reading is a relatively recent phenomenon, Statistics Canada does not currently collect the data to gauge the online consumption of e-books. However, external sources show that the introduction of e-readers and tablets is starting to have an impact. With the arrival of the iPad in 2010 and the subsequent variety of other computer tablets, e-books and e-publishing now have the infrastructure to appeal to the marketplace.<sup>12</sup>

Statistics about conventional book reading, however, show that older Canadians tend to read more than youth. In 2010, individuals age 65 to 74 were 1.4 times more likely than average to read at least one book per month, while younger Canadians age 15 to 24 had a rate of activity that was 0.8 times that of the average Canadian (Chart 6).<sup>13</sup> Moreover, according to an American study, older individuals also tended to buy more books, making them an important buying market.<sup>14</sup> Will e-publishers target these older readers? Will older Canadians be more likely to embrace e-reading than online music? As baby boomers move into their senior years, the development of e-reading will be an interesting phenomenon to follow.<sup>15</sup>

**Chart 6** Canadians age 65 to 74 were 1.4 times more likely than the average Canadian to read at least one book a month in 2010



Source: Statistics Canada, General Social Survey, 2010.

### Conclusion

Since 2000, Internet use has increased for all Canadians, including older generations who are going online at increasing rates. Older people, however, do not use the Internet as much for music listening. While there may be concerns that older Canadians are being left out of music consumption on the Internet, they continue to listen to music as frequently as they did in the early 2000s. The generational divide was also large for Internet video and film consumption, even though older Canadians spend more time watching television.

As Internet-literate baby boomers are about to enter their later years, they represent an important market for new products and platforms, which may be designed to meet their needs. E-reading, for instance, might eventually become a niche for later cohorts of retirees as older Canadians are still the biggest consumers of books. All of this will happen as the

cultural industries experiment with shifting business models and new pricing and retail strategies regarding new technological developments and changing copyright legislation and regulations. Technology and Internet-based products and platforms are changing rapidly (see *Timeline: Culture consumption on the Internet*), and it is difficult to predict what will happen next. It is clear, however, that these changes will continue to have a significant impact on the culture industries as consumers adjust to these changes and, perhaps, demand even more flexible options to meet their need for culture products.

**Mary K. Allen** is a senior analyst at Statistics Canada and worked with the Statistics Canada Culture Statistics Program when she wrote this article.

### Timeline: Culture consumption on the Internet

- 1994: First Canadian online newspaper edition
- 1994: MP3 files proliferate on the Internet
- 1997: First MP3 audio player
- 1998: First portable MP3 audio player
- 1999: Beginning of peer-to-peer file sharing
- 2001: Introduction of iPod
- 2004: iTunes launched in Canada
- 2005: Introduction of YouTube
- 2006: First e-reader devices introduced
- 2007: Music outlet Sam the Record Man closes in Toronto
- 2008: iTunes movies and iPhone introduced in Canada
- 2009: Launch of Kindle e-reader
- 2010: Launch of Kobo e-reader, iPad and Netflix
- 2011: Internet primary source of video for youth, iTunes in the Cloud
- 2012: Over half of cell phones now smartphones
- 2012: Introduction of streaming subscription services

### Data sources, methods and definitions

This study brings together data from two main sources: the General Social Survey (GSS 1998, 2000, 2005, and 2010) and the Canadian Internet Use Survey (CIUS 2005 and 2010) to explore how Canadians in different age groups have adopted the Internet as a source of cultural content. Information from a variety of other sources was also used and appears in the endnotes.

**General Social Survey** (1998, 2000, 2005 and 2010): The General Social Survey (GSS) collects data on social trends in order to monitor changes in Canadian society over time and provide information on specific social issues of current or emerging interest. The 1998, 2005 and 2010 surveys focused on time use and included questions on a variety of culture activities. The 2000 questionnaire focused on access to and use of information communication technology. Because of changes to questions and survey methods over time, caution should be used when comparing results from different survey years.

**Canadian Internet Use Survey** (2005, 2010): The Canadian Internet Use Survey (CIUS) measures household access to the Internet and individual online behaviour including electronic commerce. Because of changes to questions and survey methods over time, caution should be used when comparing results from different survey years.

**Age groups:** The General Social Survey collects information from Canadians age 15 and over. The GSS analysis uses 10-year age groups starting with age 15 to 24. The Canadian Internet Use Survey, however, surveyed Canadians age 18 and over in 2005, and 16 and over in 2010. Therefore, all information from the CIUS has been adjusted to start with an 18-to-24 age group and continues with 10-year groups as used in the GSS. For the most part, the analysis refers to 15- to 24-year-olds when referring to youth and younger groups and to those 65 and over when referring to older groups.

**Relative rate of activity:** Ratios of the relative rate of activity were used for this analysis to present the relationship between various activities and age. These provide a standard indicator for comparing the age profile of different activities, especially where questions have changed and their levels cannot be compared over time.

A relative rate of activity is a ratio comparing the proportion of a group that participates in a given activity with the rate for the overall population. Therefore, for example, if 98.5% of youth used the Internet in the previous month and the overall average was 83.6%, then the relative rate of activity would be  $98.5\%/83.6\%$  or 1.18, meaning they are 1.18 times more likely than average to use the Internet (at least once in the previous month). This ratio provides a standardized measure for comparing the participation of different age groups in a variety of activities.



### Survey questions on Internet use and culture consumption

Information on Internet use and culture consumption was collected using various questions for the different surveys. In some cases, measures are derived from a combination of questions (e.g., music listening for all formats). Below are the various survey questions that have been used to derive the following concepts:

#### Internet-use statistics

**GSS 2000:** In the last month, how often did you use the Internet at HOME?

**GSS 2010:** In the past month, did you use the Internet?

#### Music-listening statistics

**GSS 1998:** During the past 12 months did you

... listen to cassettes, CDs or records? (Include time spent listening to music whether at home, in the car, etc.) How often?

**GSS 2005:** During the past 12 months, did you

... listen to music on CD's, cassette tapes, DVD audio discs, records, etc. OR

... listen to downloaded music on your computer, MP3 player, etc. How often?

**GSS 2010:** During the past 12 months, how often did you

... listen to music on CD's, cassette tapes, DVD audio discs, records etc. OR

... listen to downloaded music on your computer, MP3 player etc.?

This analysis does not include listening to radio. Radio listening is a different type of listening—it is not restricted to music and may be more passive than other listening. This analysis focuses instead on listening to CDs, cassettes, etc. and downloaded music files.

#### Internet-based music consumption

**GSS 2000:** Do you do any of the following activities through the Internet? Do you

... listen to music?

**GSS 2005:** In the past 12 months, did you listen to downloaded music on your computer, MP3 player, etc. How often?

**GSS 2010:** In the past 12 months, how often did you listen to downloaded music on your computer, MP3 player, etc.?

#### Internet-based audiovisual consumption

**GSS 2000:** Do you do any of the following activities through the Internet? Do you

... watch television?

**CIUS 2005:** During the past 12 months, have you used the Internet at home?

... to download or watch TV over the Internet OR

... download or watch a movie over the Internet

**CIUS 2010:** During the past 12 months, have you used the Internet:

... to download or watch TV online OR

... to download or watch movies or video clips online?

**CIUS 2010:** During the past 12 months, have you used the Internet:

... to download or watch TV online OR

... to download or watch movies or video clips online?

#### Caution when comparing measures

Because of the changing nature of Internet use, the questions on Internet-based consumption have been adapted over time. This means that these measures cannot be directly compared. Because of the difficulty involved in comparing actual rates of activity, this analysis focuses on relative rate of activity by age. Table A.1 provides the answers to the preceding questions by survey year.

## Consumption of culture by older Canadians on the Internet

### Survey questions on Internet use and culture consumption (continued)

**Table A.1 Culture consumption and Internet-based activities, by age**

	Total	15 to 24	25 to 34	35 to 44	45 to 54	55 to 64	65 to 74	75 and over
	percentage							
<b>Music listening, 1998</b>								
Listened to cassettes, records or CDs at least once a week	74.9	94.1	86.0	76.5	70.4	62.0	52.0	42.0
<b>Internet-based activities, 2000</b>								
Used the Internet at home at least once in previous month	33.8	51.0	38.5	39.6	35.1	22.6	9.3	3.8
Used the Internet in the previous 12 months	52.8	84.5	66.1	60.3	50.7	31.7	11.2	5.2
Listened to music on the Internet	24.2	58.9	30.5	21.8	16.3	8.6	2.8	1.0 <sup>e</sup>
<b>2005</b>								
Listened to music at least once a week (all formats)	76.9	95.3	86.2	79.5	72.4	67.3	61.6	51.0
Listened to downloaded music in previous 12 months	28.6	68.4	39.9	25.1	17.6	10.0	6.5	5.5 <sup>e</sup>
Listened to downloaded music weekly	23.3	62.2	31.6	18.2	12.9	7.1	4.4 <sup>e</sup>	3.9 <sup>e</sup>
<b>2010</b>								
Used the Internet in previous month	83.6	98.5	96.2	92.6	88.3	77.3	59.7	29.3
Listened to music at least once a week (all formats)	72.6	94.5	85.2	76.2	68.7	59.1	56.6	44.2
Listened to downloaded music in previous 12 months	50.9	91.4	74.3	57.1	38.8	30.2	14.7	10.4
Listened to downloaded music weekly	40.1	86.5	57.5	43.2	26.4	18.3	10.1	6.7

E use with caution

Note: Use caution when comparing measures. For a description of specific questions used to produce these measures, see *Data sources, methods and definitions*.

Source: Statistics Canada, General Social Survey, 1998, 2000, 2005 and 2010.

### Notes

1. See Silver (2001).
2. Relative rate of activity is a ratio comparing the proportion of a group that participates in a given activity with the rate for the overall population. Changes in the relative rate of activity between 2000 and 2010 were mostly driven by changes in Internet use within various age groups.
3. See Veenhof and Timusk 2009.
4. Between 2000 and 2010, Statistics Canada's sound recording survey underwent major methodological changes so it is difficult to document the continuing fall in revenues that began in the late 1990s. Data before 2005 are not comparable to new survey data. Between 2005 and 2010, however, total operating revenues fell from \$765 million to \$553 million (Statistics Canada 2013). Other data sources show a similar trend. According to the Canadian Recording Industry Association (CRIA), which was renamed Music Canada in 2011, shipments of CDs by major Canadian record labels fell from \$544 million in 2005 to \$221 million in 2010 (Music Canada n.d.).
5. The number of music stores dropped from 927 in 2005 to 520 by 2011 (Statistics Canada 2012).
6. Caution should be used in making detailed comparisons of rates of use over time due to question changes. In particular, questions about listening to downloaded music were only introduced to the General Social Survey in 2005 and this change may have an impact on the results. Also, weekly frequency questions do not reveal potential changes in the intensity of music listening within a week.
7. Some older Canadians who do not use the Internet reported listening to downloaded music. They may therefore be listening to music on devices or CDs that were obtained from the Internet by someone else.

8. While the General Social Survey can provide information on music listening, no data on the music purchasing habits of older Canadians are available. However, given the drop in sales of 'hard format' music like CDs (see note 5), it is possible that older Canadians are continuing to rely on existing music collections rather than purchasing or otherwise acquiring music.
9. Statistics Canada does not currently collect information on music and video streaming. The 2010 General Social Survey only asked about listening to music downloaded from the Internet and did not ask about listening to music by streaming music and music videos on the Internet.
10. See Linder 2009.
11. See Statistics Canada 2011.
12. By 2012, data from a BookNet Canada report showed that online purchases of e-books accounted for 16% of book sales in Canada (National Post 2012).
13. There was no notable age difference in book reading in the 1998 and previous cycles of the General Social Survey. This raises some interesting questions about the impact of the Internet on the reading habits of youth.
14. No Canadian data on book buying habits by age were available. Data from the American 2011 Survey of Book-Buying Behavior, however, show a strong relationship between book purchases and age (Verso Advertising 2012).
15. Data on magazine and newspaper reading on the Internet, as well as other aspects of Internet culture (such as video gaming), are not collected by the GSS.

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